Monitoring

Perform Minneapolis
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Monitoring is the day-to-day activity of paying attention to how the employee's work is going. Both the supervisor and employee track progress toward meeting the work expectations that were established during the Planning Phase. There should be regular conversations where feedback is provided about how the work is going and what, if anything, is needed to achieve the work expectations. Both the supervisor and employee should keep notes about accomplishments and challenges. Recording these instances in Halogen creates the basis for useful feedback.

Work expectations

The work expectations agreed upon during the Set Work Expectations Process will automatically appear in the **My Performance** area under the **Work Expectations** tab. You can view your own work expectations at any time, and supervisors can view their employees' work expectations. If necessary, additional work expectations can be added and existing work expectations can be edited. Work expectations can also be deleted.

Work expectations will be included in your appraisal during the Recognition Phase of the performance management process.

To View a Work expectation

1 Do either of the following:

- To view one of your own work expectations, click **My Performance**, and then click **Work expectations**.
- To view an employee's work expectations, click **My Employees**, then, in the **Work expectations** column, click the number for the appropriate employee.

2 In the **Employee Work expectation** column, click the work expectation you want to view.

To Add a New Work expectation

1 Do either of the following:

- To add a work expectation for you, click **My Performance**, and then click **Work expectations**.
- To add a work expectation for one of your employees, click **My Employees**, then, in the **Work expectations** column, click the number for the appropriate employee.

2 Click **Add**.

3 In the **Title** box, enter the Major Job Duty.

4 (Optional) Do any of the following:

- In the **Description** box, enter the Outcomes (Results), Performance Standards and Resources needed.
- In the **Weight** box, enter a weight value between 0 and 100 for the work expectation.
- In the **Linked To** area, click the link icon to link your work expectation to an organizational goal.
- Use the **Start Date**, **Due Date**, and/or **Completed Date** calendar icons to set the required dates.
- To send an email reminder about the due date of the work expectation, select the **Send me a reminder** check box, and then enter a number in the **day(s) before the due date** box, and then, if required, select the **Then every** check box and enter a number in the **day(s)** box.
- From the **Status** list, click a status.
- From the **Percent Complete** list, click a percentage.
- In the **Progress Flag** area, click the progress of the work expectation.

5 Click **OK**.

To Edit a Work expectation

1 View the work expectation you want to edit. For more information, see *"To View a Work expectation" on page 1*.

2 Do any of the following:

- In the **Title** box, edit the Major Job Duty.
- In the **Description** box, edit the Outcomes (Results), Performance Standards and Resources needed.
- In the **Weight** box, enter a weight value.
- In the **Linked Goals** area, click the link icon to link your work expectation to an organizational goal.
- Use the **Start Date**, **Due Date**, and/or **Completed Date** calendar icons to set the required dates.
- From the **Status** list, click a status, then from the **Percent Complete** list, click a percentage, and then click a progress flag icon.
- If you want the Subject of the work expectation to receive an email reminder about the due date, select the **Send me a reminder** check box, and then enter a number in the **days before the due date** box. Then, if required, select the **Then every** check box and enter a value in the **days** box.

3 Click **OK**.

The work expectation is updated and the **Modified Date** column reflects your changes.

NOTE: *You cannot edit the Title (major job duty) or Description (outcomes (results), performance standards and resources) of work expectations your supervisor has added.*

To Delete a Work expectation

1 Do either of the following:

• To delete one of your own work expectations, click **My Performance**, and then click **Work expectations**.

• To delete an employee work expectation, click **My Employees**, then, in the **Work expectations** column, click the number for the appropriate employee.

2 Do either of the following:

• To delete a single work expectation, select the check box next to the work expectation you want to delete.

• To delete all work expectations, select the check box at the top of the column.

3 Click **Delete**, and then click **OK** to confirm.

NOTE: *You cannot delete work expectations that were added by your supervisor, including work expectations created via the set work expectations process.*

Development Plans

Development plans are created by each employee with guidance and direction from their supervisor. Development should be an on-going, joint process that helps the employee enhance their skills, knowledge and experience. Development can be accomplished through formal training, participation on work teams, special projects and assignments, coursework, etc.

Each year, one to three personal development opportunities should be identified and documented in Halogen.

To Add a Development Plan

1. Do either of the following:
   - To add a development plan for yourself, click **My Performance**, and then click **Development Plans**.
   - To add a development plan for an employee, click **My Employees**, then, in the **Development Plans** column, click the number for the appropriate employee.
2. Click the **Development Plans** tab.
3. Click **Add**.
4. In the **Title** box, enter a title.
5. (Optional) Do any of the following:
   - In the **Description** box, enter information about the development plan.
   - If you have a completed past appraisal, you can link a competency to this development plan. From the **Related Competency** list, click the competency that you want to link to the development plan.
   - In the **Due Date** and/or **Completed Date** boxes, use the calendar icons to set the required dates.
   - If reminders have been configured by your administrator, you can receive email reminders relating to dates. Select the **Send me a reminder** check box, and then enter a number in the **day(s) before the due date** box. Then, if required, select the **Then every** check box, and then enter a value in the **days** box.
   - From the **Status** list, click a status.
6. Click **OK**.

To View a Development Plan

1. Do either of the following:
   - To view your own development plans, click **My Performance**, and then click **Development Plans**.
   - To view an employee’s development plans, click **My Employees**, then, in the **Development Plans** column, click the number for the appropriate employee.

2 Click the **Development Plans** tab.

3 (Optional) Do any of the following:

- If there are many development plans in the list, you can sort the list, customize the columns displayed, and so forth, to find the development plan you're looking for. For more information, see *"Working with Results Lists" on page 11*.
- To filter the list of development plans, click **Options**, then complete the fields as required, and then click **Refresh List**. For more information, see *"Filtering Lists" on page 12*.
- Click the expand icon next to a development plan to view its description.

4 In the **Development Plan** column, click the development plan you want to view.

To Edit a Development Plan

1 Do either of the following:

- To edit one of your own development plans, click **My Performance**, and then click **Development Plans**.
- To edit an employee's development plan, click **My Employees**, then, in the **Development Plans** column, click the number for the appropriate employee.

2 Click the **Development Plans** tab.

3 (Optional) Do any of the following:

- If there are many development plans in the list, you can sort the list, customize the columns displayed, and so forth, to find the development plan you're looking for. For more information, see *"Working with Results Lists" on page 11*.
- To filter the list of development plans, click **Options**, then complete the fields as required, and then click **Refresh List**. For more information, see . *"Filtering Lists" on page 12*.
- Click the expand icon next to a development plan to view its description.

4 In the **Development Plan** column, click the development plan you want to edit. **Tip:** If you want to see the description of a development plan, click the expand icon next to it.

5 Do any of the following:

- In the **Title** box, change the title.
- In the **Description** box, enter or edit details.
- If a completed past appraisal is available, you can link a competency to the development plan. From the **Related Competency** list, click the competency that you want to link to the development plan.
- In the **Due Date** and/or **Completed Date** box(es), use the calendar icons to change or add dates.
- If reminders have been configured by your administrator, the owner of the development plan can receive email reminders relating to dates. Select the **Send me a reminder** check box, and then enter a number in the **day(s)**

before the due date box. Then, if required, select the **Then every** check box, and then enter a value in the **days** box.

- From the **Status** list, click a status.

6 Click **OK**.

To Delete a Development Plan

1 Do either of the following:

- To delete one of your own development plans, click **My Performance**, and then click**Development Plans**.
- To delete an employee's development plan, click **My Employees**, then, in the **Development Plans** column, click the number for the appropriate employee.

2 Click the **Development Plans** tab.

3 (Optional) Do any of the following:

- If there are many development plans in the list, you can sort the list, customize the columns displayed, and so forth, to find the development plan you're looking for. For more information, see *"Working with Results Lists" on page 11.*
- To filter the list of development plans, click **Options**, then complete the fields as required, and then click **Refresh List**. For more information, see *"Filtering Lists" on page 12.*
- Click the expand icon ⊞ next to a development plan to view its description.

4 Do any of the following:

- To delete a single development plan, select the check box next to the development plan you want to delete.
- To delete all development plans, select the check box at the top of the column.

5 Click **Delete**, and then click **OK** to confirm.

Feedback

Feedback allows you to provide input on your, your employees', or your colleagues accomplishments throughout the year. The following types of feedback are available.

- Journal Notes
- Recognition
- Supervisor Notes

You can provide recognition to anyone in your organization, but you can only create journal notes for yourself. If you are a supervisor, you can also provide feedback to your direct reports using Supervisor Notes.

Journal and Supervisor Notes can be used to capture the details of coaching sessions, recap conversations regarding how the work is going, or any other information that would be helpful to access during the recognition phase (which includes an appraisal).

Recognition can be used to provide and document performance feedback to any employee. This feedback is available for review and consideration during the recognition phase of performance management.

To View Feedback

1 Do either of the following:
- To view your own feedback, click **My Performance**, and then click **Feedback**.
- To view your employee's feedback, click **My Employees**, then, in the **Feedback** column, click the number for the appropriate employee.

2 In the **Note** column, click the feedback you want to view.

To Add Feedback

1 Do either of the following:
- To add feedback for yourself, click **My Performance**, and then click **Feedback**.
- To add feedback for an employee, click **My Employees**, then, in the **Feedback** column, click the number for the appropriate employee.

2 Click **Add** then click the type of feedback you want to add.

If adding a Supervisor Note, start typing the name of the recipient of the feedback in the Find Recipients box, or click Advanced Search to use first name, last name, department, and so forth in your search.

Tip: Click a shortcut link to quickly add people to the list of recipients.

4 (Optional) Do any of the following:
- In the Title box, edit the title of the feedback.

- Enter the details of the feedback in the text box, using rich text such as bold, italics, and so forth, if needed.
- If you are adding a Journal Note for yourself and you want to allow your supervisor to view the feedback, select the Allow my supervisor to view this note check box.
- If you are adding a Supervisor Note for an employee and you want to allow the employee to see the journal note, select the Share feedback with employee check box.

5 Click **OK**.

To Edit Feedback

1 Do either of the following:

- To edit your own feedback, click **My Performance**, and then click **Feedback**.
- To edit an employee's journal notes, click **My Employees**, then, in the **Feedback** column, click the number for the appropriate employee.

2 In the **Note** column, click the feedback you want to edit.

3 Do any of the following:

- In the **Title** box, edit the title.
- Edit the details of the feedback in the text box, using rich text such as bold, italics, and so forth, if needed.

4 Click **OK**.

The journal note is updated and the **Modified Date** column changes to today's date.

To Delete Feedback

1 Do either of the following:

- To delete one of your own feedback items, click **My Performance**, and then click **Feedback**.
- To delete an employee's feedback, click **My Employees**, then, in the **Feedback** column, click the number for the appropriate employee.

2 Do any of the following:

- To delete a single feedback item or multiple feedback items, select the check box(es) next to the feedback item(s) you want to delete.
- To delete all notes, select the check box at the top of the column.

3 Click **Delete**, and then click **OK** to confirm.

NOTE: *You can only delete Journal Notes that you have added. You cannot delete Supervisor Notes and Recognitions that were added by another employee (e.g. your supervisor or coworker).*

Documents

You can add, view and delete documents that are relevant to your, or your employees', performance. For example, you may want to scan a letter of recommendation or an award. The types of documents you can add are as follows:

.pdf	.doc	.docx
.txt	.xls	.xlsx
.jpg	.gif	.bmp

To View Documents

1 Do either of the following:

- To view your own documents, click **My Performance**, and then click **Documents**.
- To view the documents of one of your employees, click **My Employees**, then, in the **Documents** column, click the number for the appropriate employee.

2 (Optional) Do any of the following:

- If you have many documents in the list, you can sort the list, customize the columns displayed, and so forth, to find the document you're looking for. For more information, see *"Workingwith Results Lists" on page 11 .*
- To filter the list of documents, click **Options**, then complete the fields as required, and then click **Refresh List**. For more information, see *"Filtering Lists" on page 12.*

3 In the **Document** column, click the document you want to view.

4 Do either of the following:

- To view the file now, click **Open**.
- To save the file to your computer for later viewing, click **Save**, then select a directory, then enter a file name, and then click **Save**.

To Add Documents

1 Do either of the following:

- To add your own documents, click **My Performance**, and then click **Documents**.
- To add documents for one of your employees, click **My Employees**, then, in the **Documents** column, click the number for the appropriate employee.

2 Click **Add**.

3 In the **Title** box, enter a title for the document.

4 Click **Browse** to locate the file you want to add.

5 If you are adding the document for an employee (not yourself), in the **Visibility** area, click either **Employee and Supervisor** or **Supervisor Only**.

NOTE: *If you are adding a document for yourself, it will automatically be viewable by both you and your supervisor. If you are a supervisor adding a document for one of your direct reports, you have the choice of whether that direct report can view the document.*

6 Click **OK**.

To Delete Documents

1 Do either of the following:

- To delete your own documents, click **My Performance**, and then click **Documents**.
- To delete an employee's documents, click **My Employees**, then, in the **Documents** column, click the number for the appropriate employee.

NOTE: *You can only delete Documents that you have added. You cannot delete Documents that were added by another employee (e.g. your supervisor or direct report).*

2 (Optional) Do any of the following:

- If you have many documents in the list, you can sort the list, customize the columns displayed, and so forth, to find the document you're looking for. For more information, see *"Workingwith Results Lists" on page 11 .*
- To filter the list of documents, click **Options**, then complete the fields as required, and then click **Refresh List**. For more information, see *"Filtering Lists" on page 12.*

3 Select the check box(es) next to the document(s) you want to delete.

4 Click **Delete**, and then click **OK** to confirm.

Working with Results Lists

Paging Through Lists of Records

At the top of record lists, “Page x of x” appears indicating the page number you are currently viewing, along with the total number of pages. By default, 20 items are shown per page in a list of records.

If there are more than 20 records, you can use the paging tools to find individual records. If you want to navigate to a specific page, you can type the page number in the **Page** box and then press ENTER.

Further, you can use the pagination buttons to move through the list of records. For more information on using these buttons, see the following table:

Button	Description
	Go to the first page in the list.
	Go to the previous page in the list.
	Go to the next page in the list.
	Go to the final page in the list.

Working with Columns in Results Lists

In results lists, data is presented in columns. You can sort and move most columns. In addition, you can show and hide most columns to present the data the way you want.

Sorting Columns

Click a column heading to sort the column. A triangle icon appears in the column header to indicate the direction of the sorting. Click the column header again to sort in the opposite direction.

> ***Tip:*** *You can also click the down arrow icon , and then click either* ***Sort Ascending*** *or* ***Sort Descending****.*

Moving Columns

You can move most columns as needed. For example, if you want the “Status” column for development plans to be the first column in the list, you can drag it to the far left of the list. When you drag a column to a new location, a green icon appears to indicate that you can move the column to the new location. A red icon indicates you cannot move the column to the new location.

Showing and Hiding Columns

You can show and hide some columns. You cannot hide some essential columns, however. For example, you cannot hide the “Note” column for journal notes.

To hide a column, pause your mouse pointer over a column header, then click the down arrow icon , then click **Columns**, and then select or clear the check box(es) next to the columns you want to show and hide, respectively.

Filtering Lists

You can filter all lists, but each type of list has different filters. For example, the work expectations list allows you to filter based on the status of the work expectations, dates associated with work expectations, and their linked status. Journal notes, on the other hand, can only be filtered using dates. Other lists allow you to filter based on process name, employee relationship, and so forth.

To Filter a List

1. Click **Options**.
2. Configure the filters as required.
3. Click **Refresh List**.
4. (Optional) Click **Options** again to close the filter area.

Printing Lists

You can print most results lists if you want a hard copy. Some lists have the option to print a standard list or an expanded list. For example, work expectations, development plans, learning activities, certifications, and journal notes allow you to print standard or expanded lists. An expanded list simply includes the details/notes associated with the records.

To print a list, click the printer icon , and then click **List** or **Expanded List** (if applicable). A new browser window appears and you can then click **Print** to send the document to your printer.

Exporting Lists

Similar to printing lists, you can export most results lists to Excel. In Excel, you can perform further analysis on the results list.

To export a list, click the Excel icon , and then do either of the following:

- To view the file immediately in your spreadsheet program, click **Open**.
- To save the file to your computer, click **Save**, then select a directory, then enter a file name, and then click Save.